



**User Training Guide** 











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#### 1. Introduction

The New Hampshire Campaign Finance System (NH CFS) was designed to enable the Candidates running for public office, Political Action Committees and Candidate Committees to report their campaign finances electronically over the Internet. The NH CFS is a browser-based system that can be accessed through an Internet browser on the user's desktop computer.

### 2. Overview of the system

The Campaign Finance System can be divided in to three different sections: Public section, Candidate/Committee section and the State Administrator section. This guide provides the steps and details on how to the use the Public and Candidate/Committee sections.

#### **Public Module:**

The user in the Public Module of the system can:

- 1. Register a Political Action Committee
- 2. Register a Candidate Committee
- 3. Register a Candidate
- 4. View Candidate/Committee Statements of Receipts and Expenditures
- 5. View Individual Contributor Reports
- 6. View list of all registered Candidates/Committees

#### **Candidate/ Committee Module:**

The user in the Candidate/ Committee Module of the system can:

- 1. View/Edit Registration Information
- 2. Add New Contribution
- 3. Add New Expenditure
- 4. Edit/File Pending Transactions
- 5. Amend Filed Transactions
- 6. Upload Transactions
- 7. Change Password
- 8. View Statements of Receipts and Expenditures

#### 3. Business Processes

This section explains some of the business processes involved in the system.

#### **Definitions:**

- 1. **Public User:** All users of the system can access the public module of the system. But a public user can access only the public module of the system.
- 2. Candidate/ Committee User: A Candidate/ Committee user is one who is authorized to use the login information of an activated Candidate/ Committee registered in the CFS. A Candidate/ Committee user can access the Candidate/ Committee and the public modules of the system.
- 3. **State Administrator:** The State Administrator is a State authorized user who can access the administrator and public modules of the system.
- 4. **New Candidate/ Committees:** Committees that are registered in the CFS and not activated are called new Candidates/Committees. New Candidate/Committee users cannot access the Candidate/Committee module of the system until the State Administrator activates the Candidate/Committee.
- 5. **Active Candidates/Committees:** Candidates/Committees that are registered in the CFS and activated are called active Candidates/Committees. Active Candidate/Committee users can access the Candidate/ Committee module of the system.
- 6. **In-active Candidates/Committees:** Candidates/Committees that are registered in the CFS and in activated are called in-active Candidates/Committees. In-active Candidate/Committee users cannot access the Candidate/Committee module of the system until the State Administrator activates the Candidate/Committee.
- 7. **Pending Transaction:** Any transaction entered by the Candidate/Committee user becomes a pending transaction. The Candidate/Committee user can edit these transactions unlimited number of times. These transactions are not visible to the public until the Candidate/Committee user chooses to file these transactions.
- 8. **Filed Transaction:** Any transaction filed by the Candidate/ committee user is a filed transaction. These transactions are visible to the public. The Candidate/Committee user can amend these transactions but all the amendments will be shown in the public reports of the Candidate/Committee.
- 9. **Public Reports:** The reports available to the public user are called public reports. The two public reports in the system are Reports of Receipts and Expenditures of Candidates/Committees and Individual Contributor Reports. These reports contain all the information that was filed by the Candidates/committees in CFS.
- 10. **Candidate/Committee Reports:** Candidate/Committee Reports are available only to Candidate/Committee users. These reports contain both filed and pending transaction information.

#### How can a user register a candidate/committee and start the system?

- 1. A public user completes and submits the registration form in the CFS.
- 2. The system provides the user with the login information for the Candidate/Committee.

- 3. The user then prints, signs and mails the registration form and any applicable fees to the State office
- 4. The administrator then verifies the registration information and activates the Candidate/Committee. Now the public user who registered the Candidate/Committee becomes a Candidate/Committee user.
- 5. The user can then login to the system using the login information.
- 6. The user can now access the Candidate/Committee module of the system.

#### How can a user download the public reports?

- 1. A public user selects a report link from the public menu of the CFS. There are two reports available to the public: Reports of Receipts and Expenditures of a Candidate/Committee and Individual Contributor Report
- 2. The user can search for the required report using the search criteria and then view/download the report in PDF/Excel format.

#### How can a user file a transaction using the system?

- 1. A Candidate/ Committee user enters a transaction in to the system. There are two ways this can be done.
  - i. The user can enter the transactions using the online forms for contributions and expenditures.
  - ii. The user can use an offline predefined Excel file format to enter the transactions. The Excel file can then be uploaded to the system.
- 2. Any transaction entered in to the CFS is stored as a pending transaction. The Candidate/Committee user then files these pending transactions making them filed transactions.

#### How can a user edit the Candidate/Committee information?

- 1. A Candidate/Committee user can edit the registration information using the Edit Registration Information feature in the Candidate/Committee module.
- 2. The following rules apply:
  - i. Candidate/Committee name cannot be changed
  - ii. The names of the candidates supported/opposed by a political committee cannot be removed. But they can be changed.
  - iii. The other officers of a political or candidate committee cannot be removed. But they can be changed.
  - iv. Candidate name of a candidate registration cannot be changed
- 3. The following changes need to be approved by the administrator before it is official and available to the public:
  - i. Any change to the name of the chairperson or treasurer of a political committee

ii. Any change to the name of the chairperson or treasurer of a candidate committee

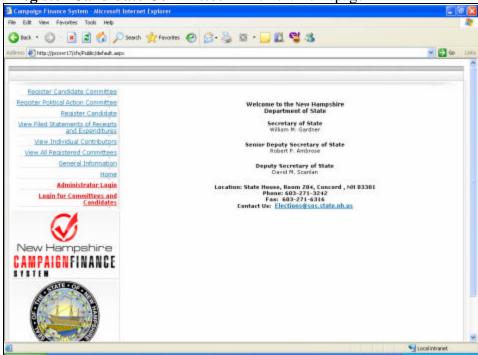
### How are the spending and contribution limits for the candidates enforced?

- 1. When a candidate registers in CFS, the administrator sets whether or not the candidate has agreed to the spending limits. This can be changed at any time after the registration.
- 2. These limits are used to inform the candidate/committee user whether or not a transaction entered in to the CFS is compliant with the NH laws.
- 3. The system will allow the candidate to file all transactions irrespective of their compliancy status.

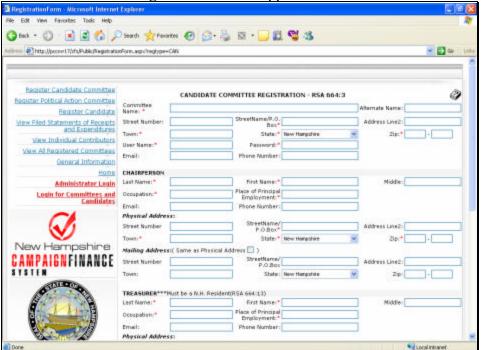
# 4. Public Section of the Campaign Finance System:

### 4.1 Candidate Committee Registration:

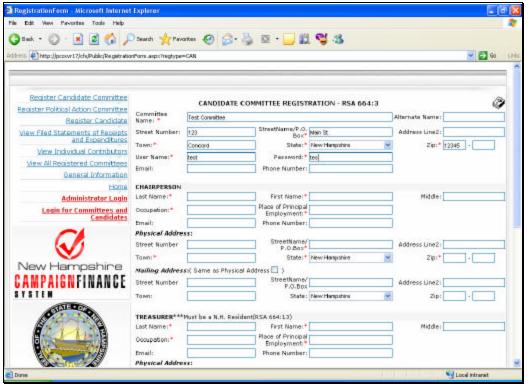
**Step 1:** Click the **Register Candidate Committee** link on the homepage



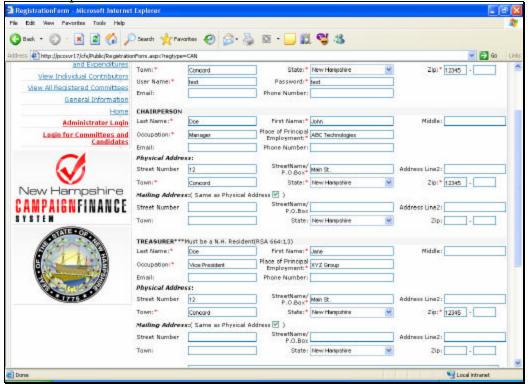
**Step 2:** The **Candidate Committee Registration Form** appears



**Step 3:** Enter the Committee details



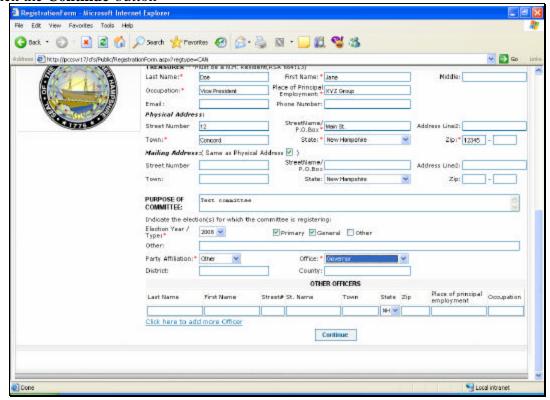
**Step 4:** Enter the Chairperson and Treasurer details

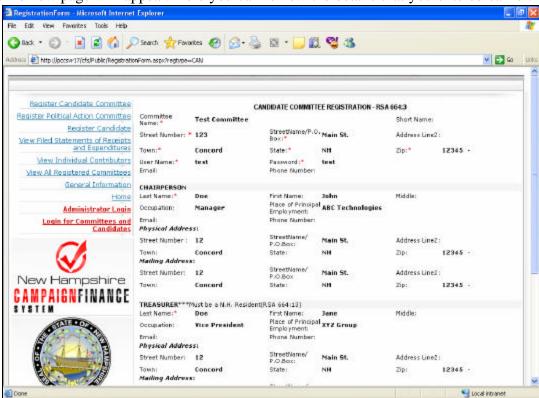


RegistrationForm - Microsoft Internet Explorer 🔾 Back = 🔘 - 🗷 🗷 🐔 🔑 Search 🤺 Pavortes 🔗 😭 - 🧓 🔯 - 📙 👯 😭 🧥 disess | http://pcsvr17/cfs/Public/Registration/form.esps/regtype=CAN × 🗗 😡 First Name: Jame Middle Last Name: Dos Place of Principal Employment CYZ Group Occupation: Vice President Phone Number: Physical Address: Street Number 12 P.O.Box Main St. Address Line21 State:\* New Hampshire Town: Concont Zip:\* 12346 -Mailing Address: (Same as Physical Address 🗹 ) Streetliame/ P.O.Box Street Number Address Line2: State: New Hampshire Zip: Test committee Indicate the election(s) for which the committee is registering: Election Year / 2008 Primary General Other Otheri Party Affiliation € Other District County OTHER OFFICERS Place of principal Occupation employment Last Name First Name Street# St. Name Town State Zip 10H W Click here to add more Office. Continue

Step 5: Enter the Purpose of the Committee, Other Officers of the Committee, Election and Office details

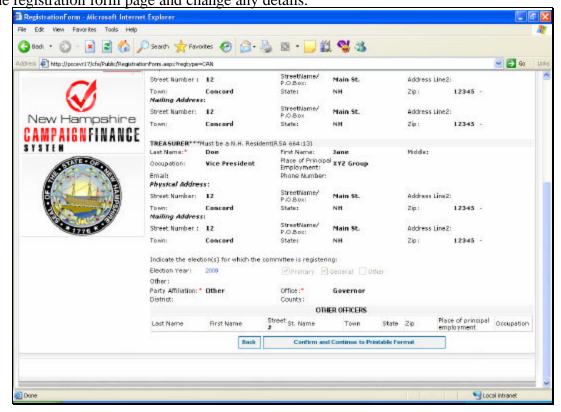
Step 6: Click the Continue button





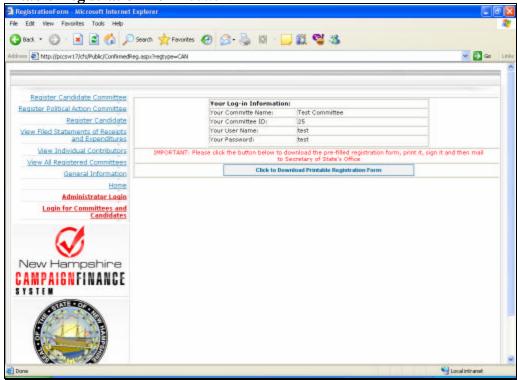
**Step 7:** The Review page will appear. Here you can review the details that you entered earlier.

**Step 8:** Click the **Confirm Continue to Printable Form** button. You can also click the **Back** button to go back to the registration form page and change any details.

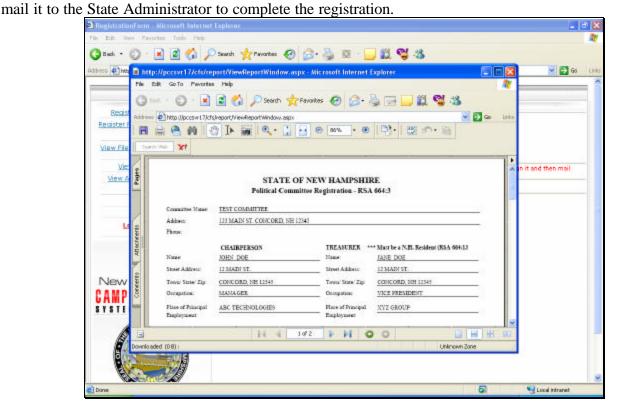


**Step 9:** This page shows the login details for the committee that you registered. After the State Administrator activates the committee, you can log into the system using these. Click the **Click to** 

**Download Printable Registration Form** button.

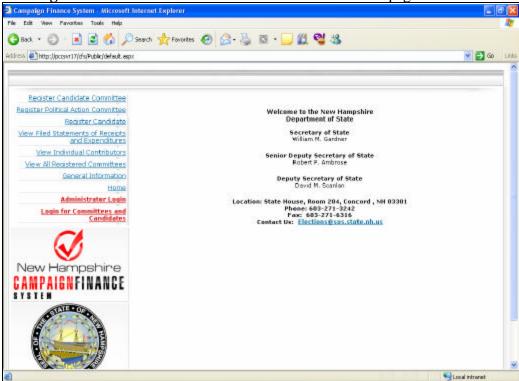


Step 10: A printable (PDF) version of the registration form will appear. You must print this, sign it and

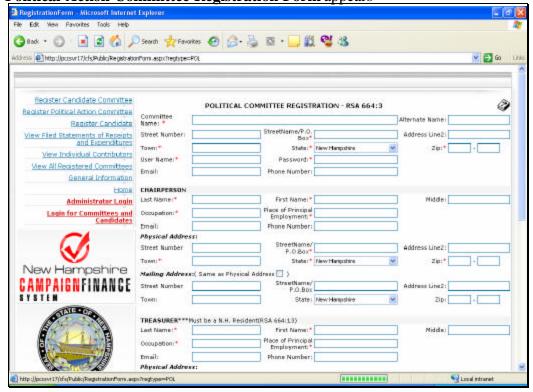


### 4.2 Political Action Committee Registration:

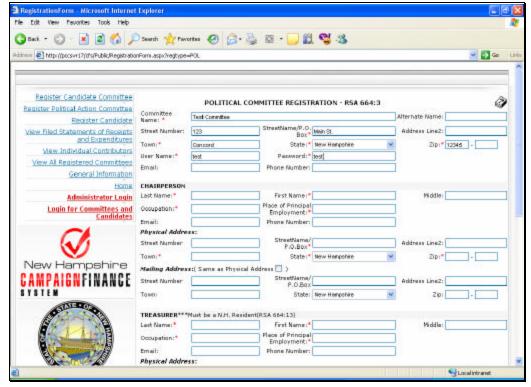
**Step 1:** Click the **Register Political Action Committee** link on the homepage



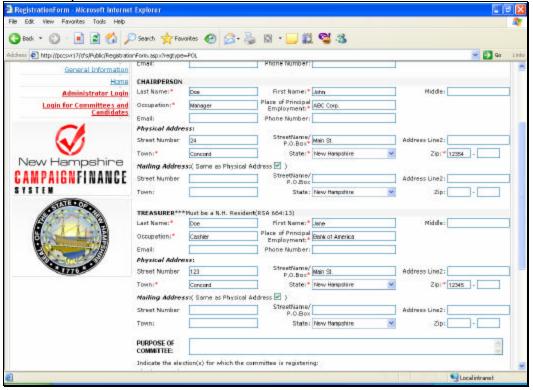
**Step 2:** The **Political Action Committee Registration Form** appears



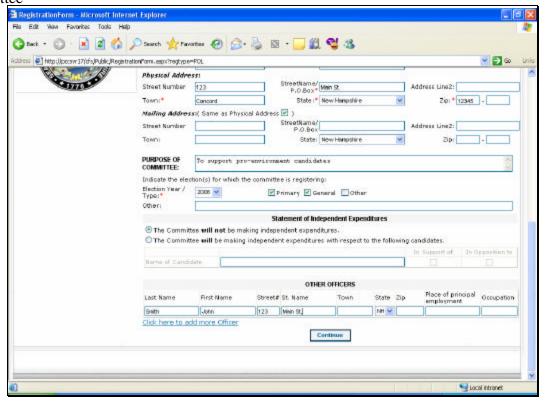
**Step 3:** Enter the Committee details



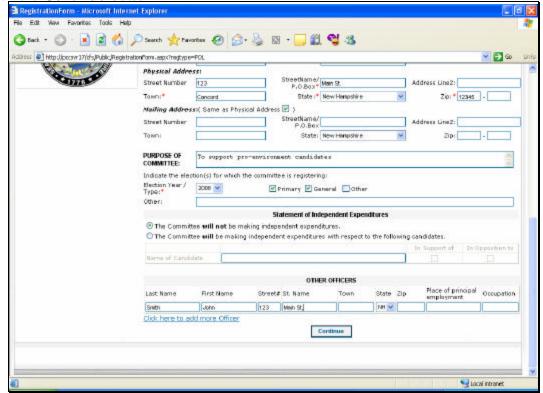
Step 4: Enter the Chairperson and Treasurer details

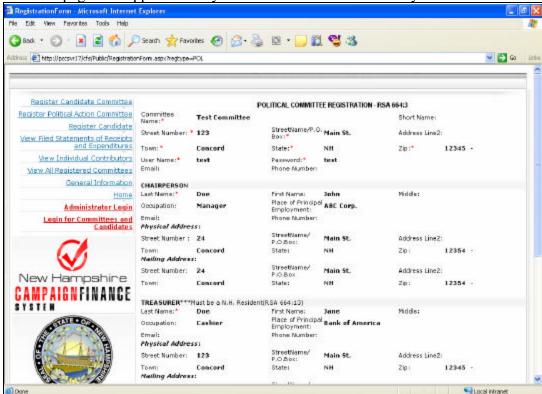


**Step 5:** Enter the Purpose of the Committee, Statement of Independent Expenditures and Other Officers of the Committee



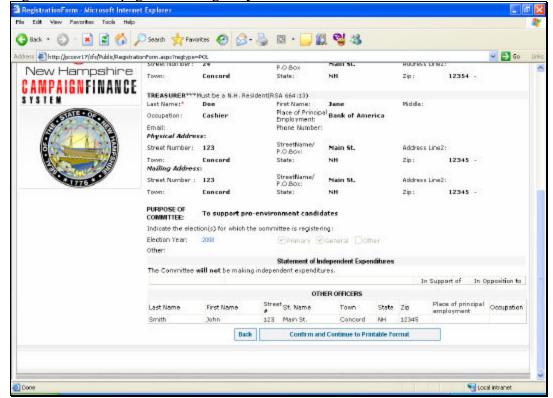
Step 6: Click the Continue button





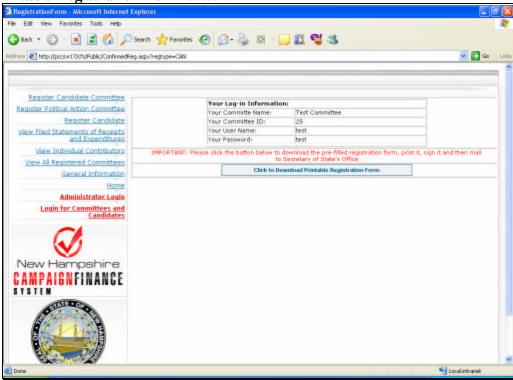
**Step 7:** The Review page will appear. Here you can review the details that you entered earlier.

**Step 8:** Click the **Confirm Continue to Printable Form** button. You can also click the **Back** button to go back to the registration form page and change any details.



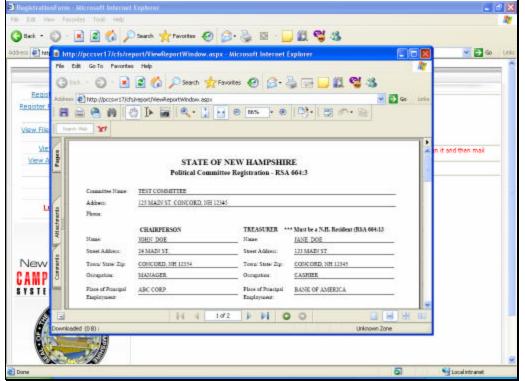
Step 9: This page shows the login details for the committee that you registered. After the State Administrator activates the committee, you can log into the system using these. Click the Click to

**Download Printable Registration Form** button.



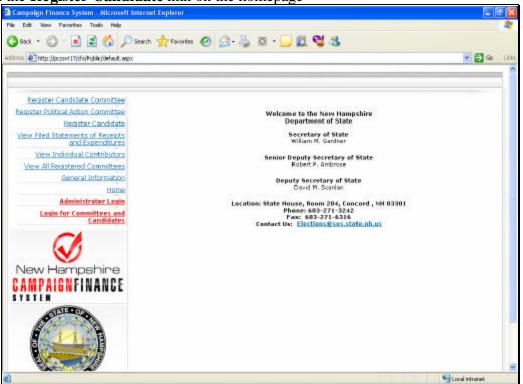
Step 10: A printable (PDF) version of the registration form will appear. You must print this, sign it and

mail it to the State Administrator to complete the registration.

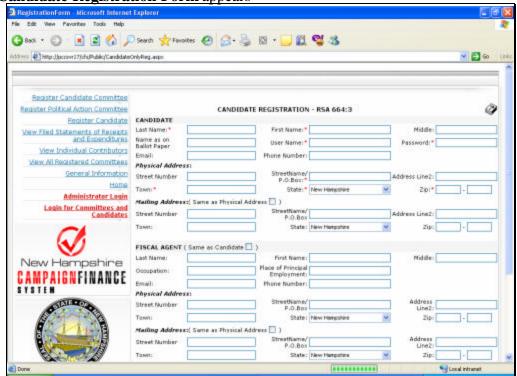


### 4.3 Candidate Registration:

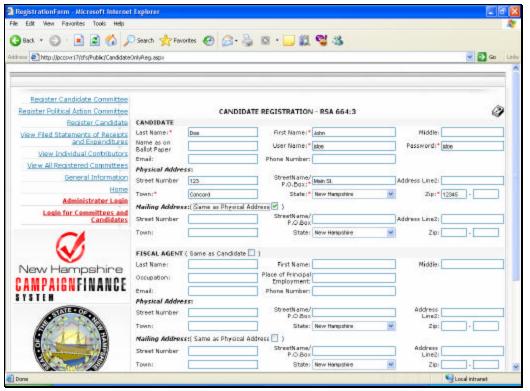
**Step 1:** Click the **Register Candidate** link on the homepage



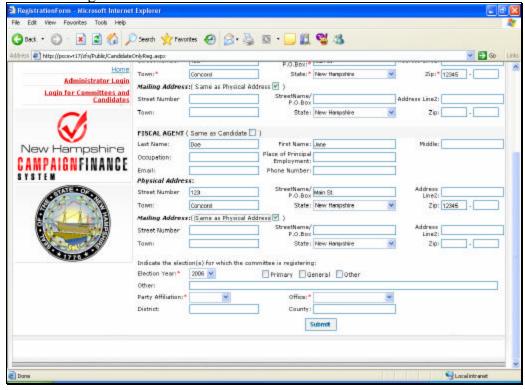
**Step 2:** The **Candidate Registration Form** appears



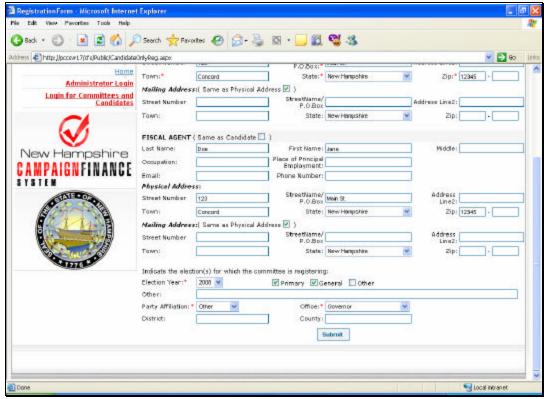
**Step 3:** Enter the Candidate details



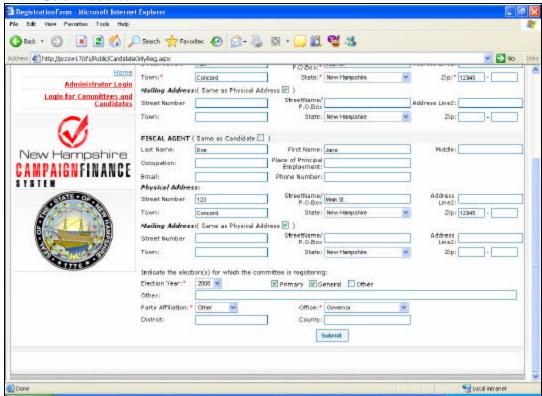
**Step 4:** Enter the Fiscal Agent details



**Step 5:** Enter the Election and Office details



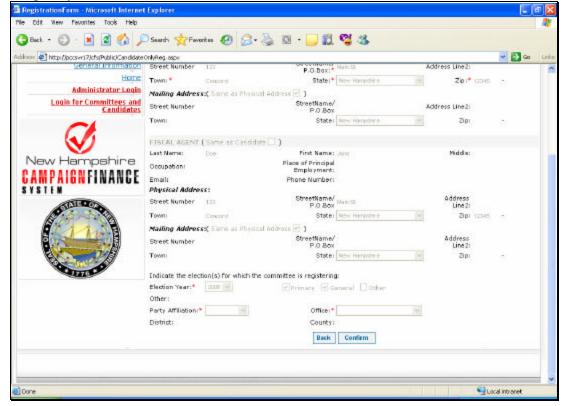
Step 6: Click the Submit button



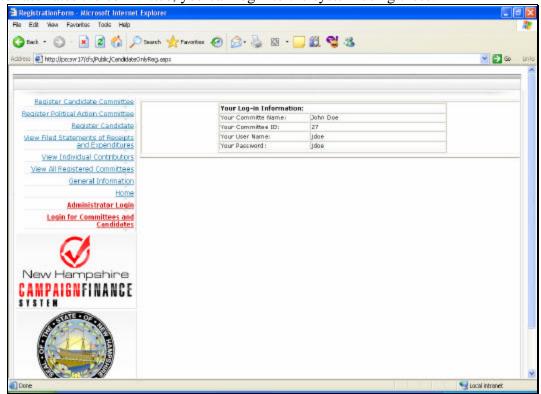
RegistrationForm - Nicrosoft Internet Explorer Pile Edit View Paventes Tools Help 🔾 Back 🕶 🔘 - 🗷 🙎 🏠 🔎 Search 🤺 Fevorites 🚱 🔗 - 🍃 🖾 😁 - 🧾 🛍 🔧 Ga brid http://pccsw-17/cfs/Public/CandidateOnlyReg.aspx Register Candidate Committee 0 Register Political Action Committee CANDIDATE REGISTRATION - RSA 664:3 Register Candidate DANDIDATE View Filed Statements of Receipts and Expenditures Name as on Ballot Paper Last Name: \* First Name: Name: View Individual Contributors Email: Phone Number: View All Registered Committees Physical Address: StreetName/ P.O.Box: Hen D. General Information Street Number 123 Home Town!\* State (\* New Hampshire Administrator Login Mailing Address (, Same as Physical Address (2) ) Login for Committees and Condidates Street Number State: Now Horponie FISCAL AGENT (Same as Candidate () Last Name: Doe Haze of Principal Employment: New Hampshire CAMPAIGNFINANCE Phone Number: Email: Physical Address: Street Number 123 State: New Hampshire Zip) 13345 Mailing Addresss( Same as Physical Address 2 ) Street Number State: New Harpshire Zip:

**Step 7:** The Review page will appear. Here you can review the details that you entered earlier.

**Step 8:** Click the **Confirm** button. You can also click the **Back** button to go back to the registration form page and change any details.

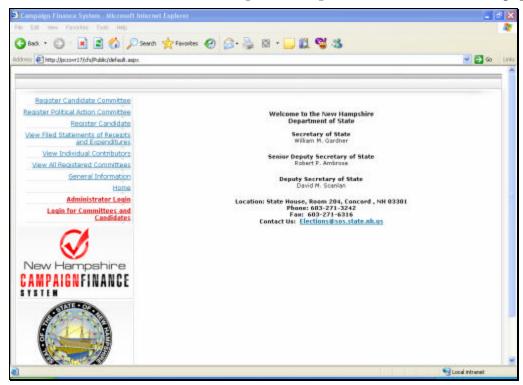


**Step 9:** This page shows the login details for the committee that you registered. After the State Administrator activates the committee, you can log into the system using these.

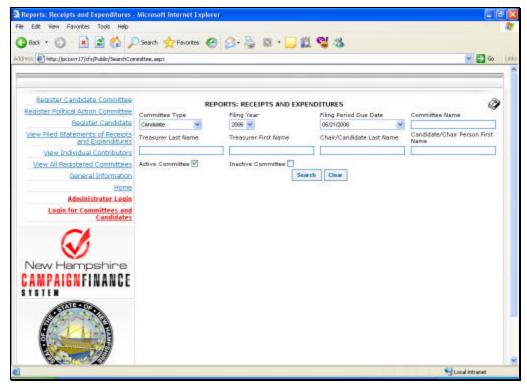


### 4.4 View Filed Reports of Receipts and Expenditures:

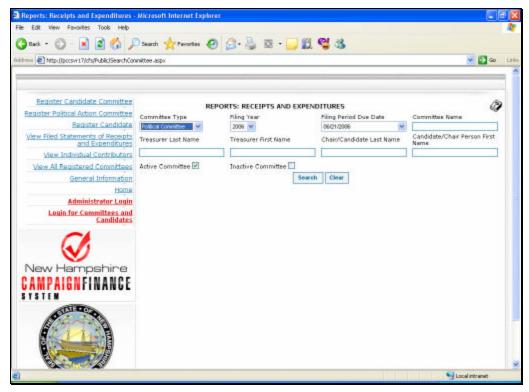
Step 1: Click the View Filed Statements of Receipts and Expenditures link on the homepage.



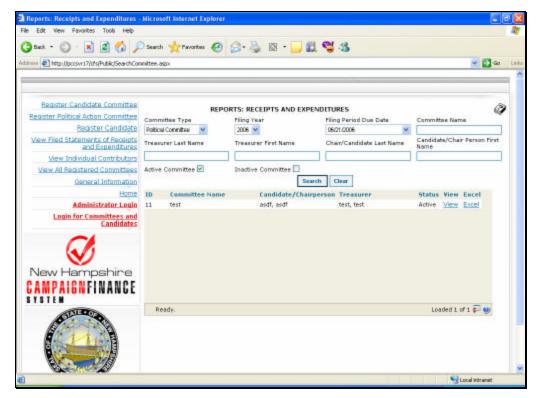
**Step 2:** A search page will appear. Here you can search for the filed Statements of Receipts and Expenditures of registered committees.



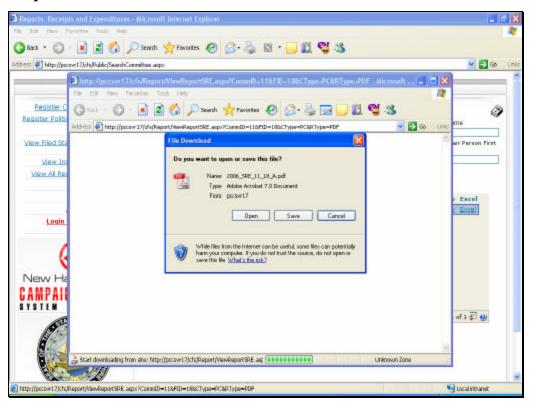
**Step 3:** Enter the search criteria and click the **Search** button.



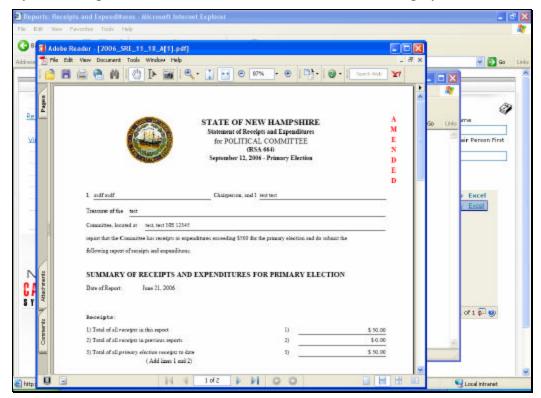
**Step 4:** The search results will be displayed. Each committee displayed on the search results will have a **View**link and an **Excel** link. Click on the **View**link to see the PDF version of the statement.



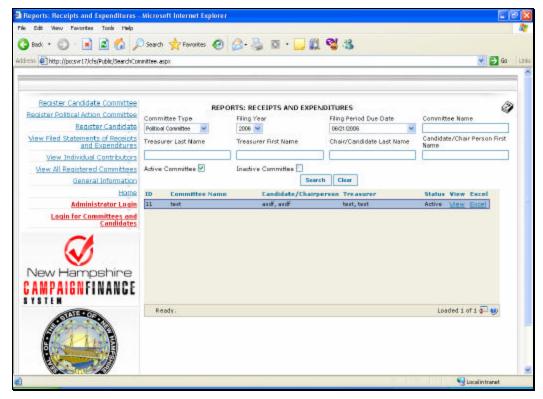
**Step 5:** A PDF Statement will be presented. You can save it by clicking on **Save** button or open it by clicking on the **Open** button.



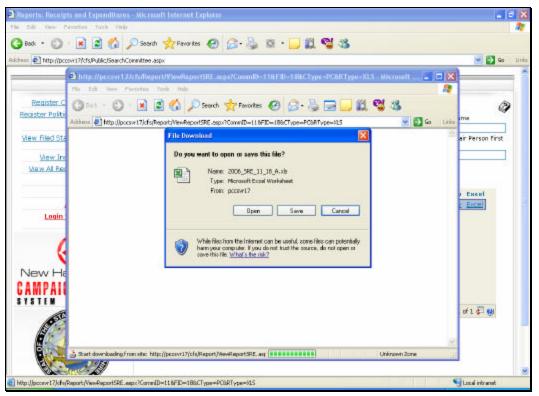
**Step 6:** When you click Open, the PDF version of the Statement will be displayed.



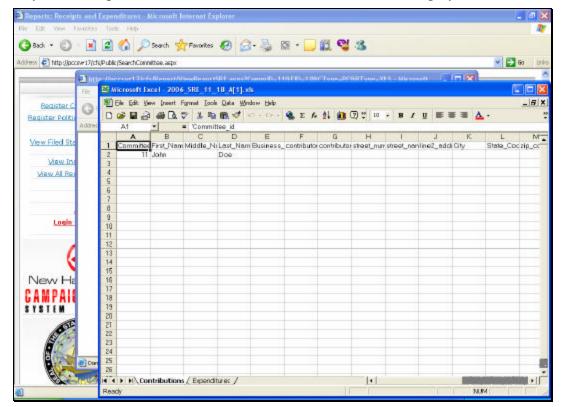
**Step 7:** Close the Statement windows and click on the **Excel** link.



**Step 8:** An Excel Statement will be presented. You can save it by clicking on **Save** button or open it by clicking on the **Open** button.

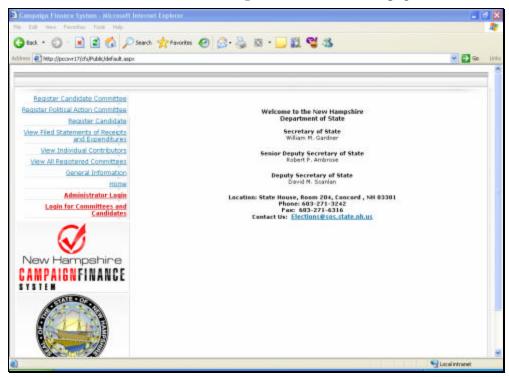


Step 9: When you click Open, the Excel version of the Statement will be displayed.

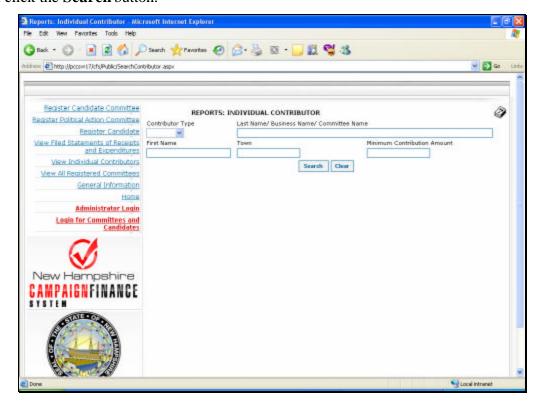


### 4.5 View Individual Contributor Report:

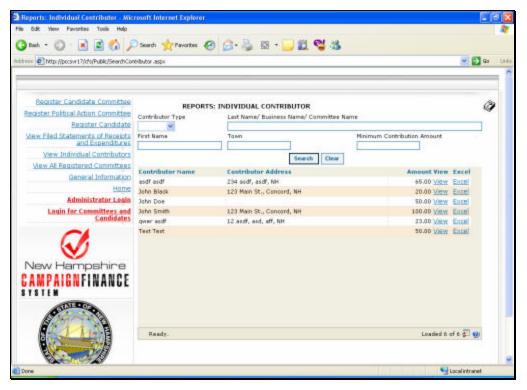
Step 1: Click the View Individual Contributor Report link on the homepage.



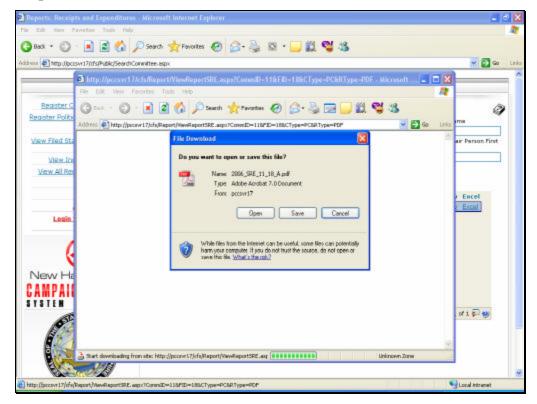
**Step 2:** A search page will appear. Here you can search for the individual contributors. Enter the search criteria and click the **Search** button.



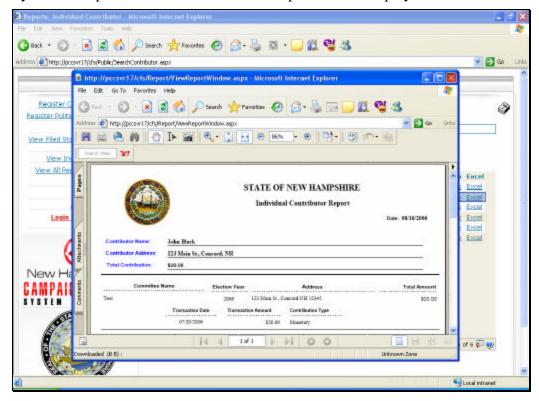
**Step 3:** The search results will be displayed. Each contributor displayed on the search results will have a **View** link and an **Excel** link. Click on the **View** link to see the PDF version of the statement.



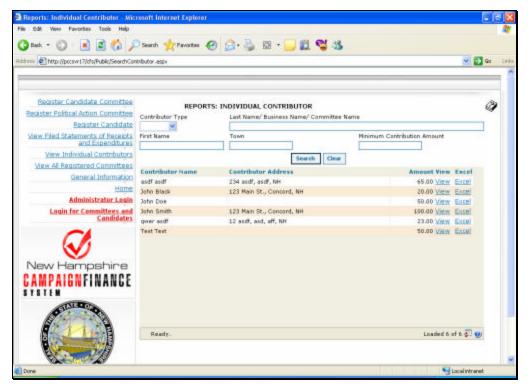
**Step 4:** A PDF Statement will be presented. You can save it by clicking on **Save** button or open it by clicking on the **Open** button.



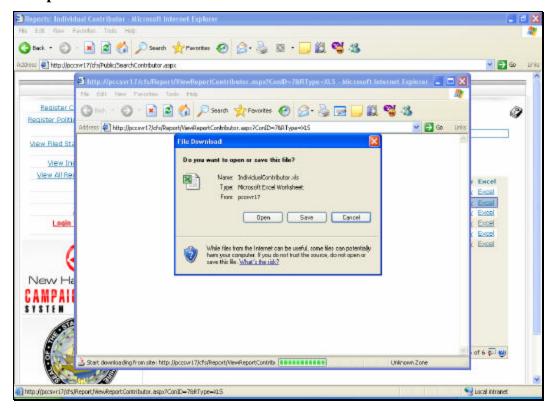
Step 5: When you click Open, the PDF version of the report will be displayed.



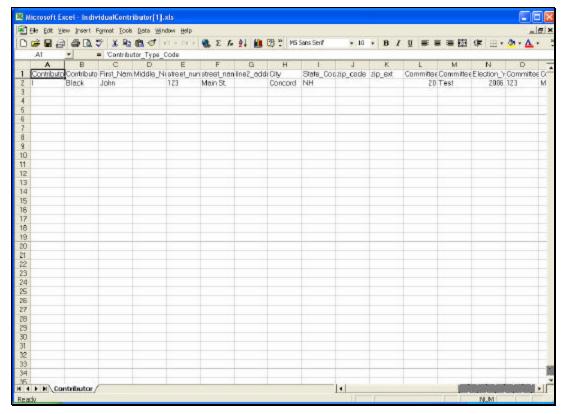
Step 6: Close the Statement windows and click on the Excel link.



**Step 7:** An Excel Statement will be presented. You can save it by clicking on **Save** button or open it by clicking on the **Open** button.

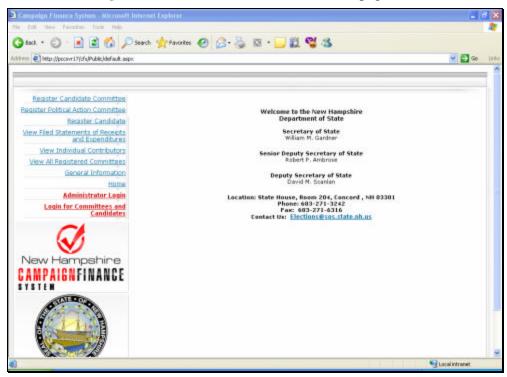


**Step 8:** When you click Open, the Excel version of the Statement will be displayed.

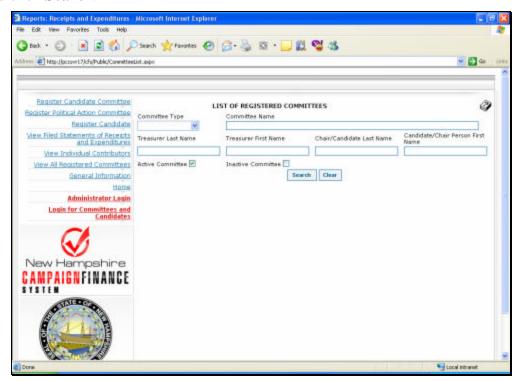


# 4.6 View List of Registered Candidates/Committees:

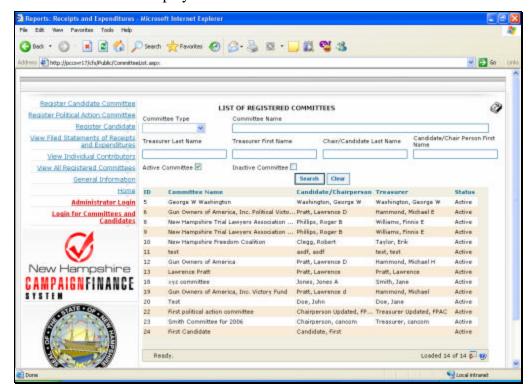
**Step 1:** Click the **View All Registered Committees** link on the homepage.



**Step 2:** A search page will appear. Here you can search for the registered Committees. Enter the search criteria and click **Search**. If you want to see list of all Active committees, just select Active Committees checkbox and click **Search**.



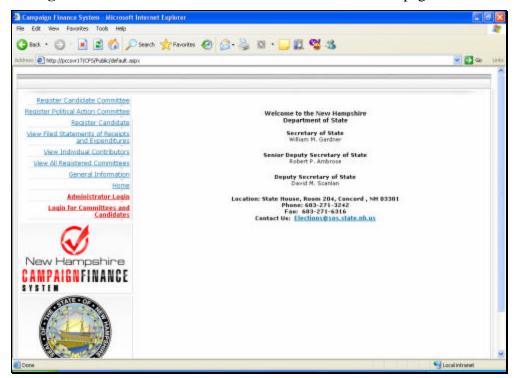
**Step 3:** The search results will be displayed.



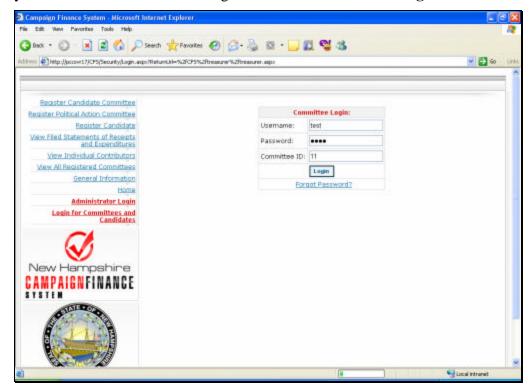
#### 5. Candidate / Committee Section:

### **5.1 Candidate / Committee Login:**

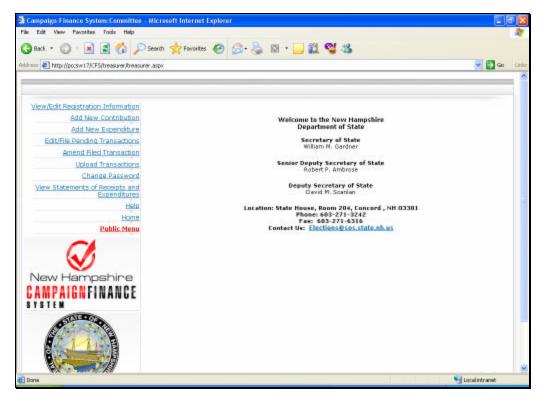
Step 1: Click the Login for Committees and Candidates link on the homepage



**Step 2:** Enter your Committee or Candidate login details and click on the **Login** button.

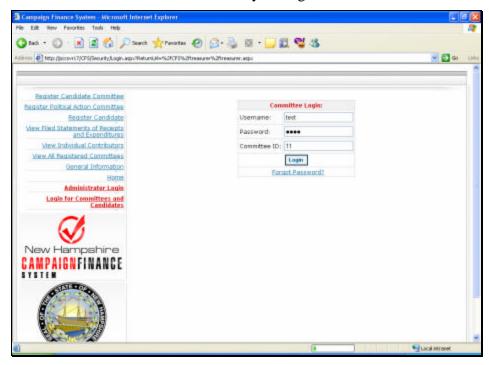


**Step 3:** The Candidate/Committee homepage will be displayed with the Candidate/Committee menu on the left

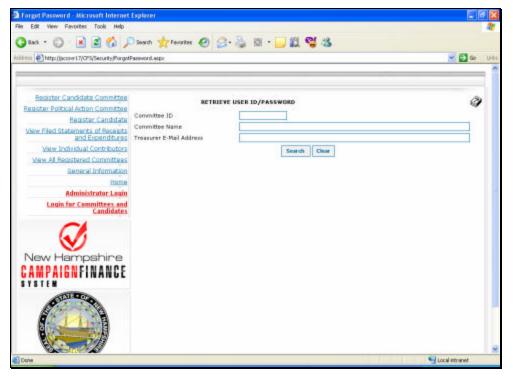


### **5.2 Retrieve Login Details:**

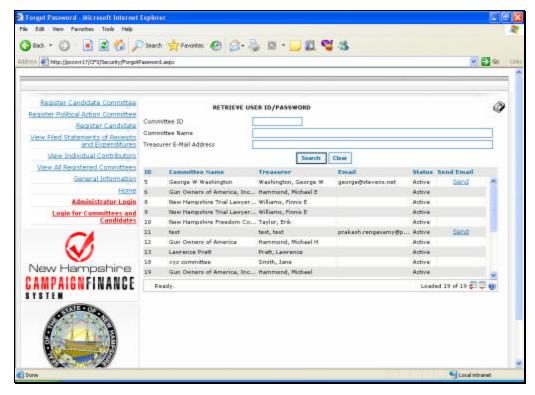
**Step 1:** In case you forgot/lost your login details and you had entered an email address for your committee, click the **Forgot Password?** link on the login page. If you did not provide an email address for your committee, contact the State Administrator to retrieve your login details.



**Step 2:** On clicking the Forgot Password? link, the system takes you to a search page. Here you can search for your committee.

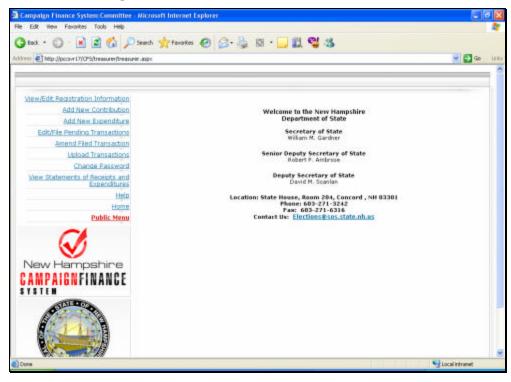


**Step 3:** Click the **Send** link on your Committee's row. This will automatically send the login details to your Committee's email address.

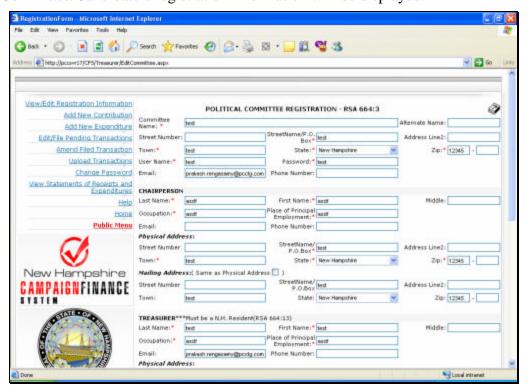


### 5.3 View/Edit Registration Information:

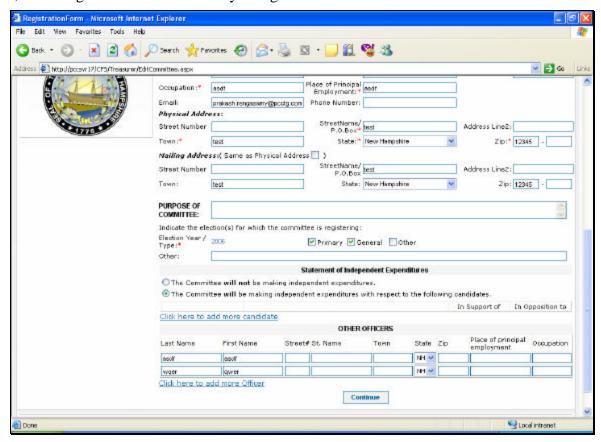
Step 1: Click the View/Edit Registration Information link on the Committee/Candidate's Menu.



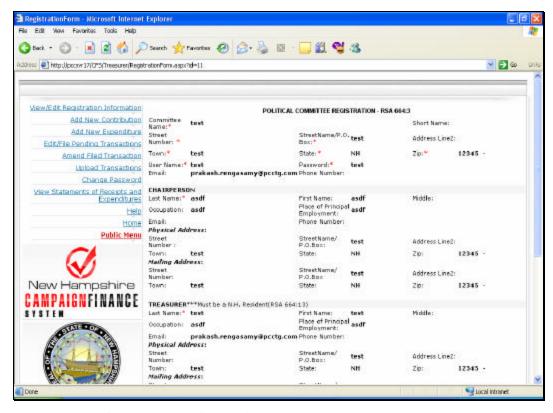
Step 2: The Committee/Candidate's registration information will be displayed.



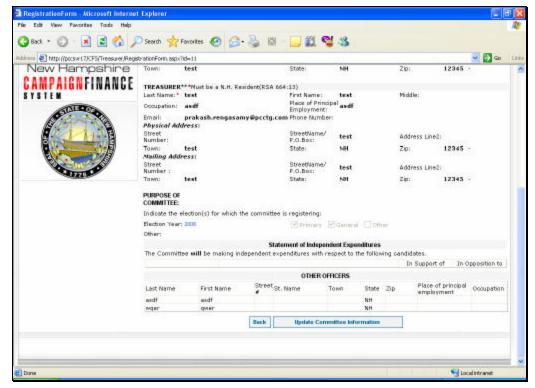
**Step 3:** Make the necessary changes and click the **Continue** button. There are few fields on this page that cannot be changed. For instance, Committee or Candidate's Name cannot be changed. There are few changes that need the State Administrator's approval. For instance, change to a Committee's Chairperson or Treasurer name needs to be approved by the State Administrator. However you can make these changes and submit them. The State Administrator will be able to see the changes and approve/decline it. Upon approval, the changes will be reflected on you registration information.



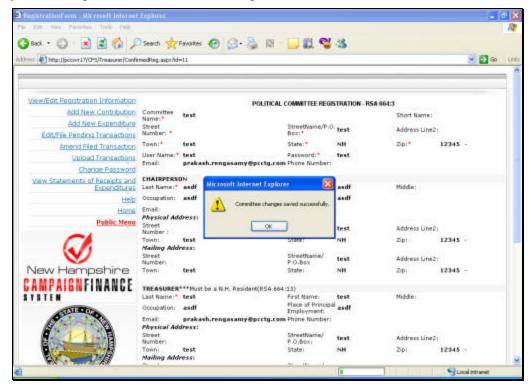
**Step 4:** On clicking Continue, it takes you to a review page where you can review the changes you have made.



Step 5: Click the Update Committee Information to submit the changes

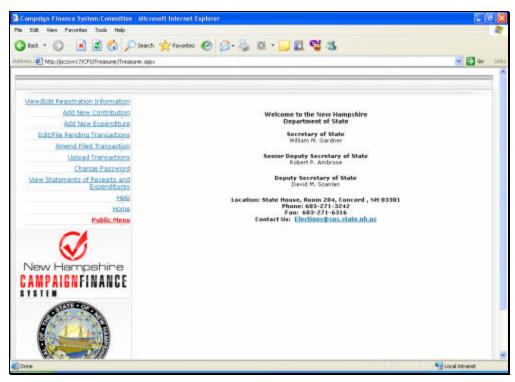


**Step 6:** The system will give a confirmation message.

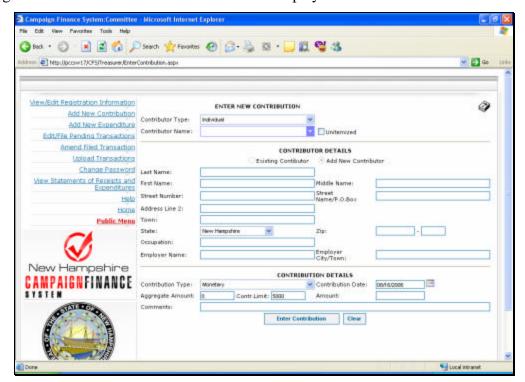


# **5.4 Entering a Contribution:**

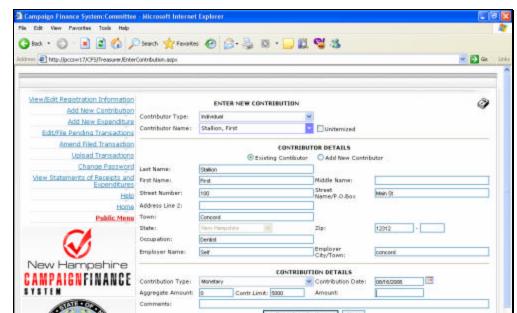
Step 1: Click the Add New Contribution link on the Candidate/Committee menu.



**Step 2:** A page to enter the contribution details will be displayed.

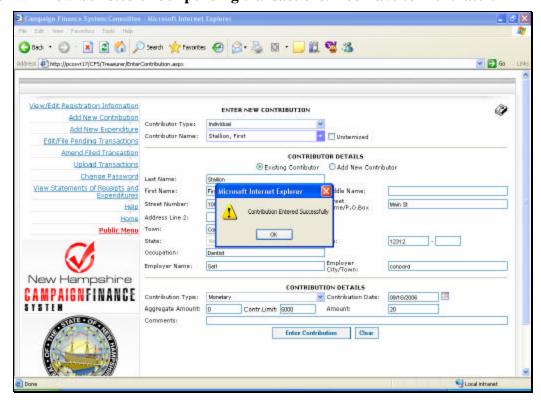


Local intranet



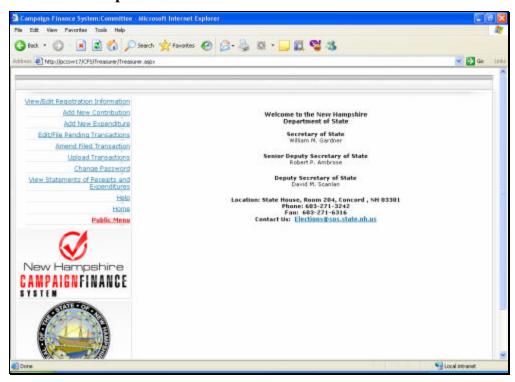
**Step 3:** Enter the Contribution details and click **Enter Contribution** 

**Step 4:** The system will give a confirmation message that the contribution has been recorded. **The entered contribution will now be listed under pending transactions. You have to file it later.** 

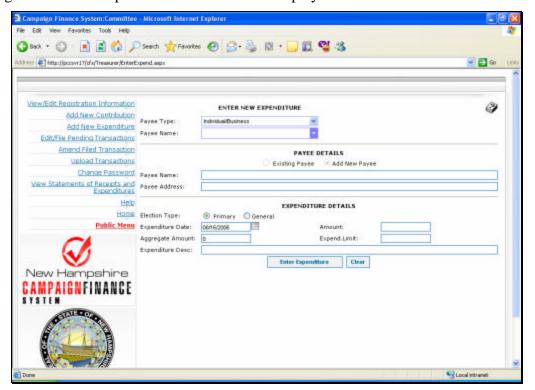


# 5.5 Entering an Expenditure:

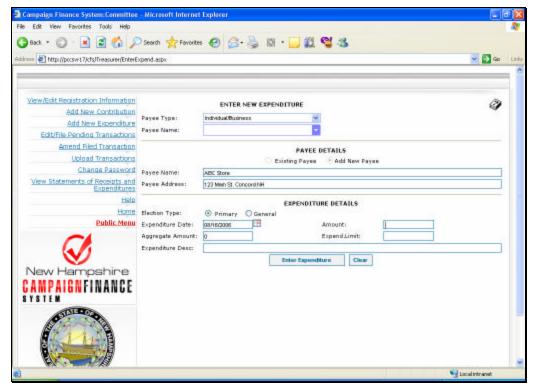
Step 1: Click the Add New Expenditure link on the Candidate/Committee menu.



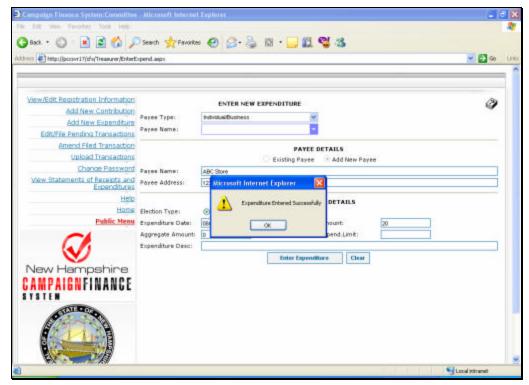
Step 2: A page to enter the expenditure details will be displayed.



**Step 3:** Enter the Expenditure details and click **Enter Expenditure**.

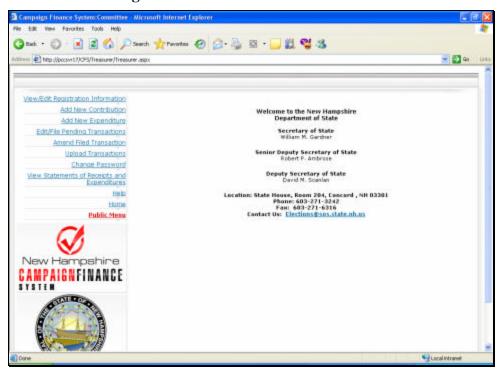


Step 4: The system will give a confirmation message that the expenditure has been recorded. The entered expenditure will now be listed under pending transactions. You have to file it later.

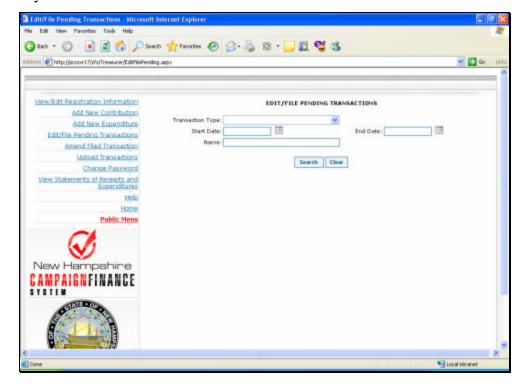


### **5.6 Edit or File Pending Transactions:**

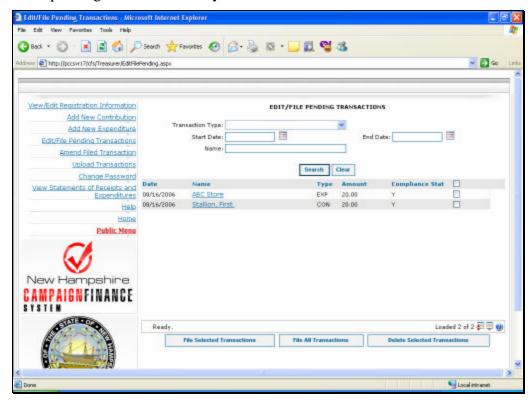
Step 1: Click the Edit/File Pending Transactions link on the Candidate/Committee menu.



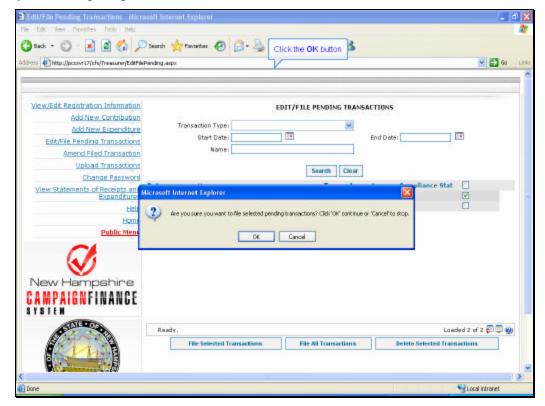
**Step 2:** A search page will be displayed. Here you can search for the pending transaction that you want to file or edit. Enter you search criteria and click **Search**.



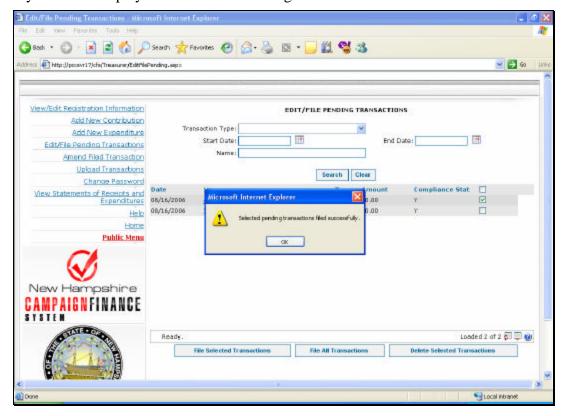
**Step 3:** The pending transactions will be displayed. You can click on the names and go to the edit page. Select one or more pending transactions that you want to file to the State.



**Step 4:** The system will prompt the user to confirm the action. Click the **OK** button.

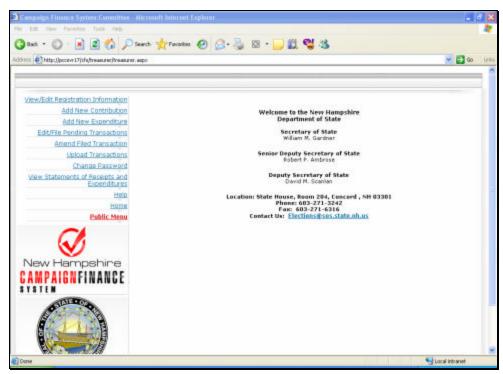


**Step 5:** The system will display a confirmation message.

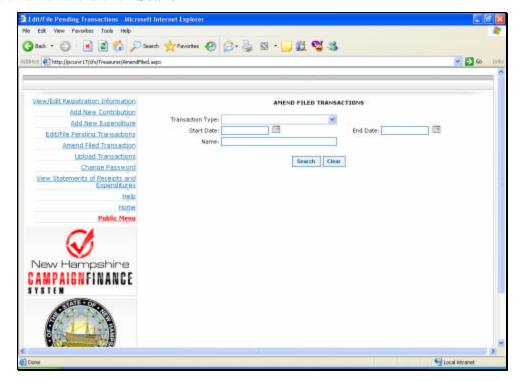


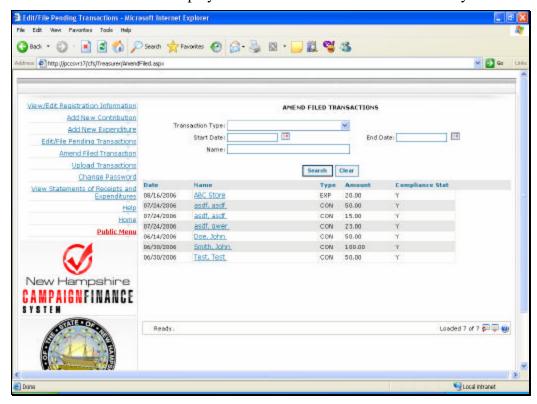
#### **5.7 Amend Filed Transactions:**

Step 1: Click the Amend Filed Transaction link on the Committee/Candidate menu



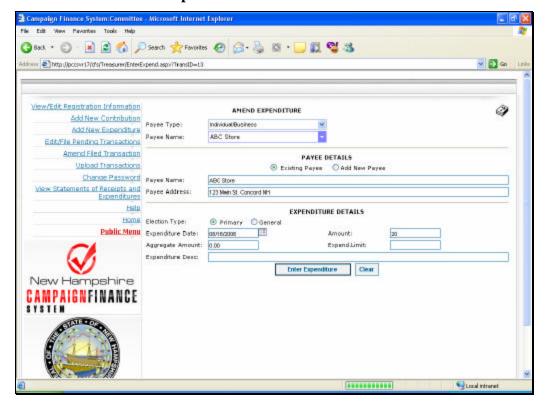
**Step 2:** A search page will be displayed. You can search for the filed transaction that you want to amend. Enter the search criteria and click **Search**.



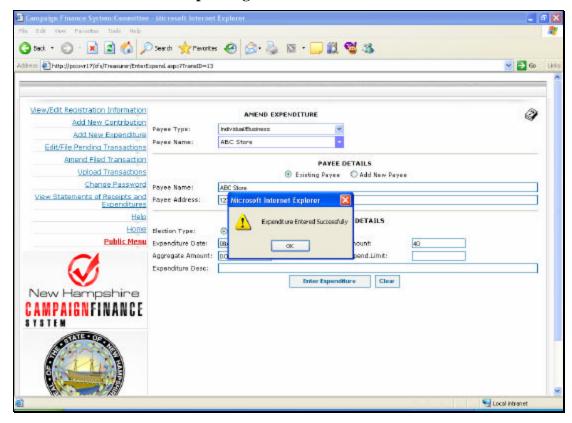


**Step 3:** The filed transactions will be displayed. Click on the transaction name that you want to amend.

**Step 4:** This will take you to the Amend Transaction page. Make the necessary changes on this page and click **Enter Contribution** or **Enter Expenditure**.

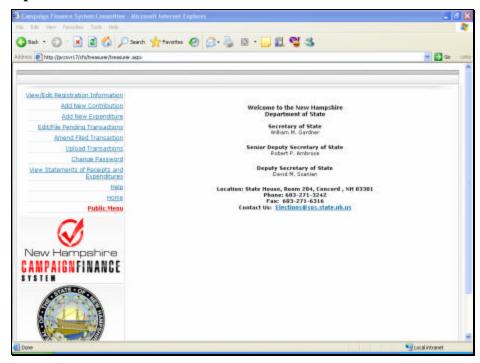


**Step 5:** The system will give a confirmation message that the amendment has been recorded. **The entered amendment will now be listed under pending transactions. You have to file it later.** 

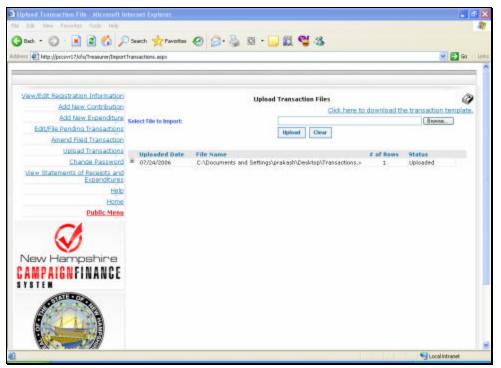


### **5.8 Upload Transactions:**

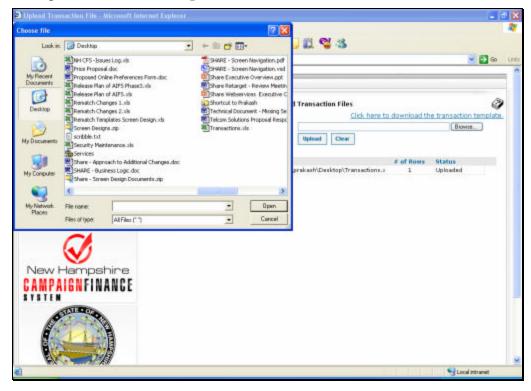
Step 1: Click the Upload Transactions link on the Committee/Candidate menu



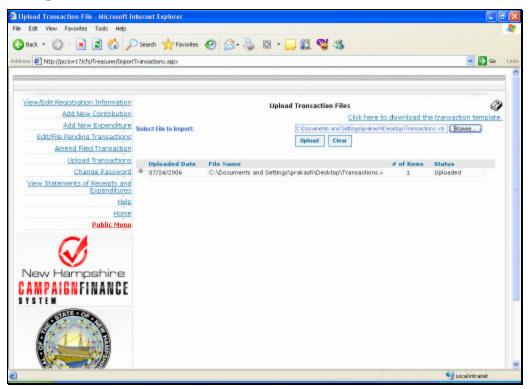
**Step 2:** The Upload Transaction page will be displayed. Here you can enter the file you want to upload or browse for the file. Click the **Browse** button. You can click on Click here to download the transaction template button to download the upload file template. This file is an excel spreadsheet.



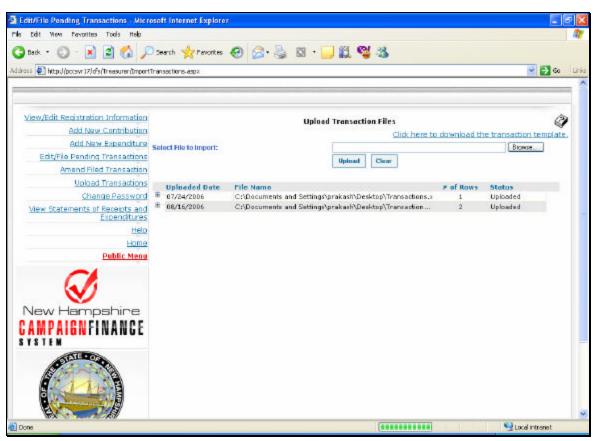
**Step 3:** Select the upload file and click **Open**.



Step 4: Click the Upload button.

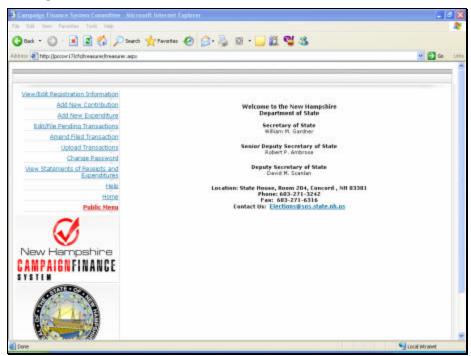


**Step 5:** When the page is refreshed, the uploaded file and its status will be displayed on the list. The system will process the file and post the results on this page. This might take a few or more minutes. If there are any errors in the file, they will also be displayed on the screen. **Once the upload is successful, the transactions that were uploaded will be listed under the pending transactions. You have to file it later.** 

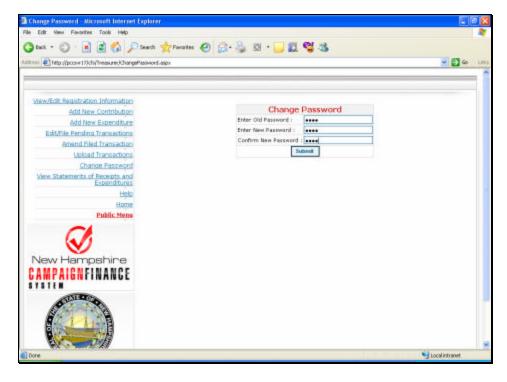


### **5.9 Change Password:**

Step 1: Click the Change Password link on the Committee/Candidate menu



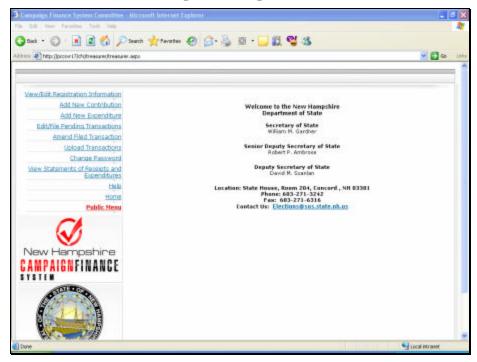
**Step 2:** The Change Password screen will be displayed. Enter the old and new passwords and click **Submit.** 



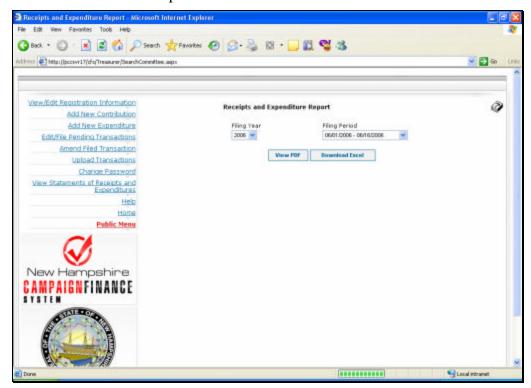
**Step 3:** The system will display a confirmation message.

# 5.10 View Statements of Receipts and Expenditures:

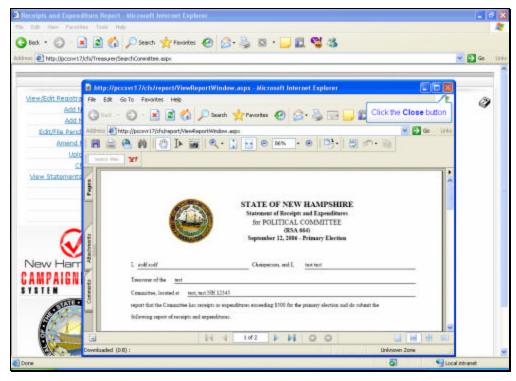
Step 1: Click the View Statements of Receipts and Expenditures on the Committee/Candidate menu



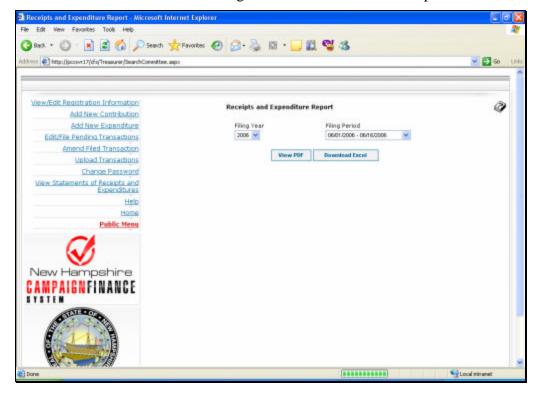
**Step 2:** The reports page will be displayed. Select the report that you wish to view. Click on the **View PDF** button to view a PDF version of the report.



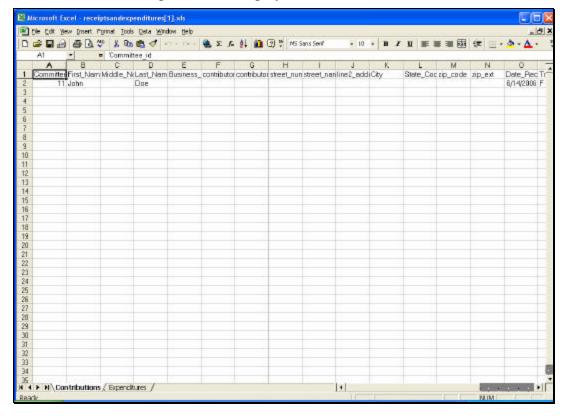
**Step 3:** A PDF version of the report will be displayed.



Step 4: Click on the Download Excel button to get an Excel version of the report.



**Step 5:** An Excel version of the report will be displayed.



#### Note:

- 1. The Reports available on the Committee/Candidate section will contain both the filed and pending transactions. The Reports available on the Public section will contain only the filed transactions.
- 2. The Committees/Candidates can view their reports before a filing deadline. The Public user can only view report after the filing deadlines.